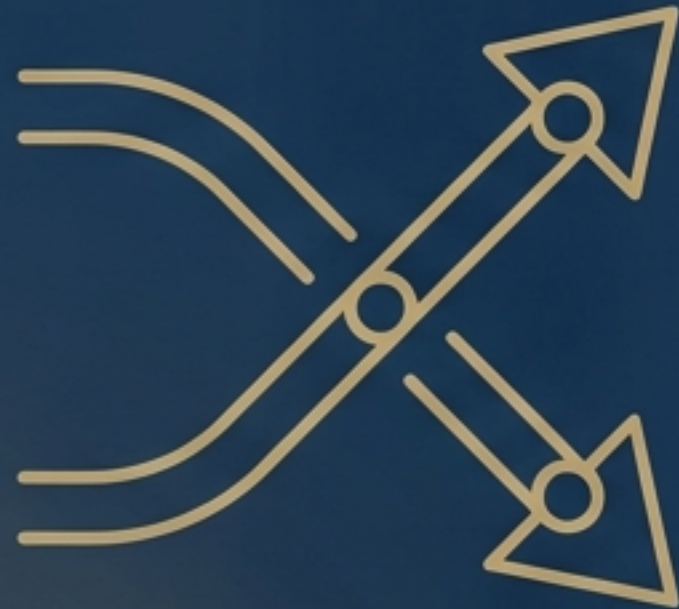


How to Present at Insurance Events Without Selling

The Educator Operating System



Make Medicare make sense to people who are confused, anxious, and tired of being marketed to.

The selling happens later, in private, with people who liked you enough to book the appointment.

The Fear vs. The Reality

The Pitch

Defenses go up immediately.
Audiences sense it from across
the room. Smiles get polite.
Business cards get thrown
away in the parking lot.

The Education

Lowers defenses. Positions
you as the trusted neighbor
who explains things, not the
stranger trying to close.

The Four-Part Structure

45

Minutes Total

Open

Frame

Teach

Close



Set the Tone. State the Deal.

90

Seconds

Walk in calm. Make a quick, **60-second personal connection** so they have a human being to attach the information to.

Explicitly state the deal: You are not selling, signing anyone up, or building a list. One-on-one reviews are strictly by their request only.

The Plain-English Roadmap

Tell them exactly what they will learn over the next two to three minutes. Not a slide of bullet points—a clear map of how Medicare works, coverage paths, and enrollment windows.

Frame the content around mistake-prevention. Senior audiences care far more about avoiding expensive mistakes in their first 60 days than they care about specific plan features.

Edit Ruthlessly

3

Big Ideas

The human brain remembers three ideas cleanly.
Senior audiences cannot absorb 40 slides in 30 minutes.
Cut your presentation in half, then cut it again.
Slides are visual scaffolding, not a teleprompter.

Compliance and Pacing

Strict Neutrality

Every word on screen must be plan-neutral, carrier-neutral, and benefit-neutral. The compliance line is the exact same on the slide as it is at the lectern.

The Breathing Room

Speak slower. Pause after key points. Resist the nervous temptation to talk faster. The room rewards the educator who breathes.

Stories Beat Statistics



The brain throws away numbers. To make a point land, attach it to a real person with disguised, relatable details.

Instead of quoting a lifelong penalty stat, tell them about Bill, the retired teacher who missed his window by four months because he thought he had until tax day.

Phrasing That Opens Space

“I get this question a lot...”

“A lot of folks aren’t sure about this...”

Validates their concerns as normal and gives permission to ask questions later. Avoids rehearsed, infomercial language like “the truth they don’t want you to know,” which instantly shuts down senior audiences.

Managing Derailments

The Arguer/Show-off

Acknowledge the point ->
State the general rule ->
Offer to discuss specific cases after the event ->
Return to slide immediately.

The Private Situation

Validate the complexity ->
Explain the format isn't suitable -> Redirect to a one-on-one review based on their actual circumstances.

The Pitch-Free Close

1. Recap the three big ideas you taught to reinforce what they are walking out with (20 seconds).
2. Restate the deal. You came to teach. No lists. No follow-ups unless they specifically ask.
3. Make the offer crystal clear. "Grab a card or use the optional sign-up sheet for a free review." Put the choice entirely in their hands. No urgency. No scarcity.

Build Your Anchors

3

Stories

Pick one teaching topic from your last event. Write three real stories with real details and real outcomes to make it land. Practice out loud until it sounds like you're talking to a friend at coffee.

The teaching gets stronger, and the appointments take care of themselves.